



**Data Entry Help Sheet 27:
CSS Direct Service Counts
Using Consumer Groups**

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SAMS Service Delivery

Background

The California Aging Reporting System (CARS) was instituted, by the California Department of Aging, (CDA) on July 1, 2008. This new system was implemented to gather the detailed client and service data required for the National Aging Programs Information System (NAPIS).

This help sheet is provided as a guide for data entering service counts. Direct services provided by CSS can now be reported directly to the State using CARS. As such, this help sheet has been prepared in the following three sections for easy reference:

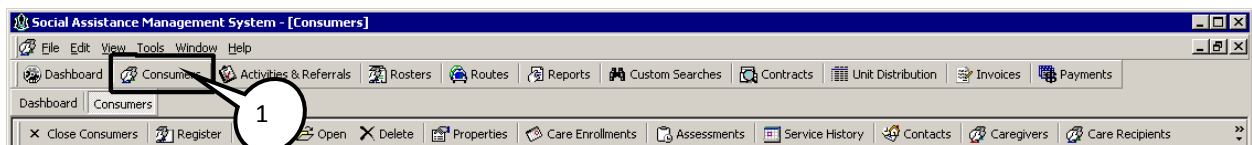
Part I: Creating a Consumer Group

Part II: Adding a Care Enrollment, Fund ID and Provider

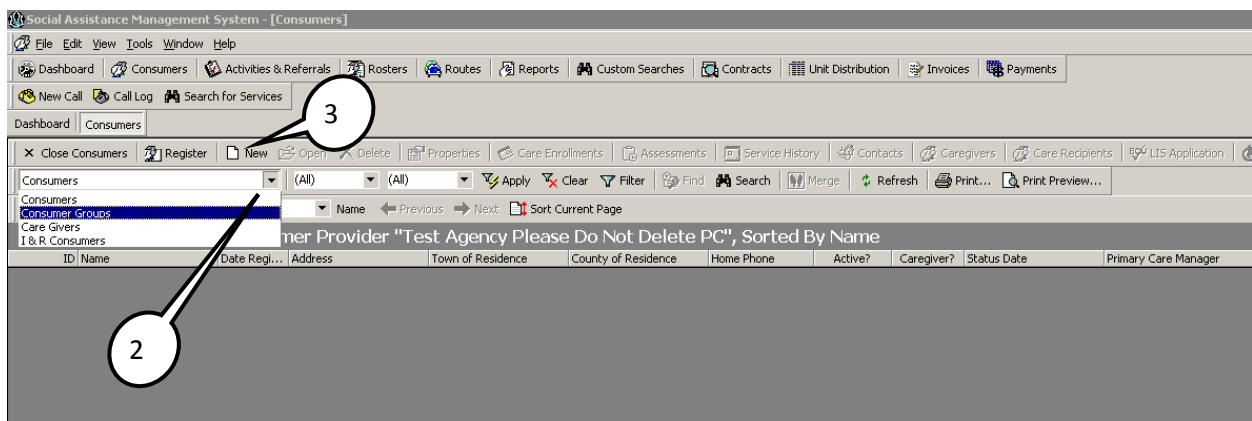
Part III: Adding Services and Units of Service

Part One: Creating a Consumer Group

1. From the SAMS main menu, select the **Consumer** button.



2. Select **Consumer Groups** from the drop down menu. You will be creating a consumer group for the billable service units that were delivered to the aged consumers.
3. Select **New** from the Consumers menu.



4. Add a consumer group name in the **Description** field.
5. Ensure that the **Date Registered** is on or before the delivery of the service.

Social Assistance Management System - [Untitled - Consumer Group]

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches Contracts Unit Distribution Invoices Payments

New Call Call Log Search for Services

Dashboard Consumer Groups [Untitled - Consumer Group]

Close Consumer Groups Save Save and Close

Untitled

Contents

Summary

Details

Service Orders

Service Delivery

Activities & Refer...

Consumer Journal

Untitled - Details

General

Ethnic Races

User Fields

Care Enrollments (1)

Fund Identifiers

Providers

Personal

Description

Date Registered 06/04/2009

Gender

Age

Residential Address

NAPIS

Status

Care

Characteristics

Abused/Neglected/Exploited No

Cognitive Impairment Unknown

Disabled No

Employment Status Unknown

Female Head of Household No

Frail No

Homebound No

Medicare Eligible No

Receiving Social Security No

State Resident Yes

Tribal No

US Citizen Yes

NSIP Meals Eligible Yes

Eligibility Type

Language English

Part II: Adding Care Enrollment, Fund ID and Provider

Once the consumer group is created, enroll the consumer group into a Care Program, a Fund Identifier and a Provider.

6. Select **Care Enrollments** from the Consumer Group Details sub-menu.

Social Assistance Management System - [Untitled - Details]

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches Contracts Unit Distribution Invoices Payments

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Date Registered 06/04/2009

Gender

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Characteristics

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Cognitive Impairment Unknown

Disabled No

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Female Head of Household No

Frail No

Homebound No

Medicare Eligible No

Receiving Social Security No

State Resident Yes

Tribal No

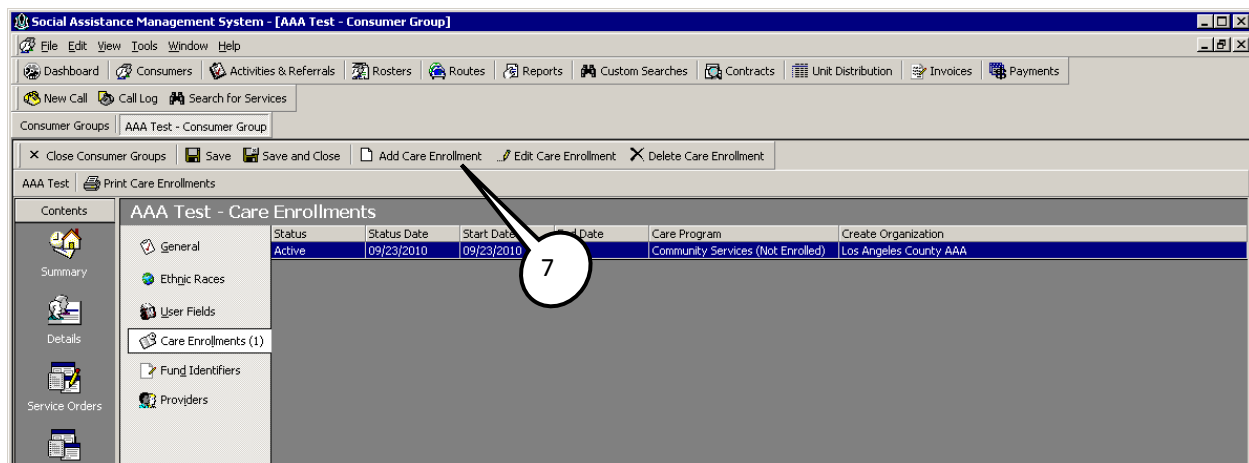
US Citizen Yes

NSIP Meals Eligible Yes

Eligibility Type

Language English

7. Click on the **Add Care Enrollment** button.

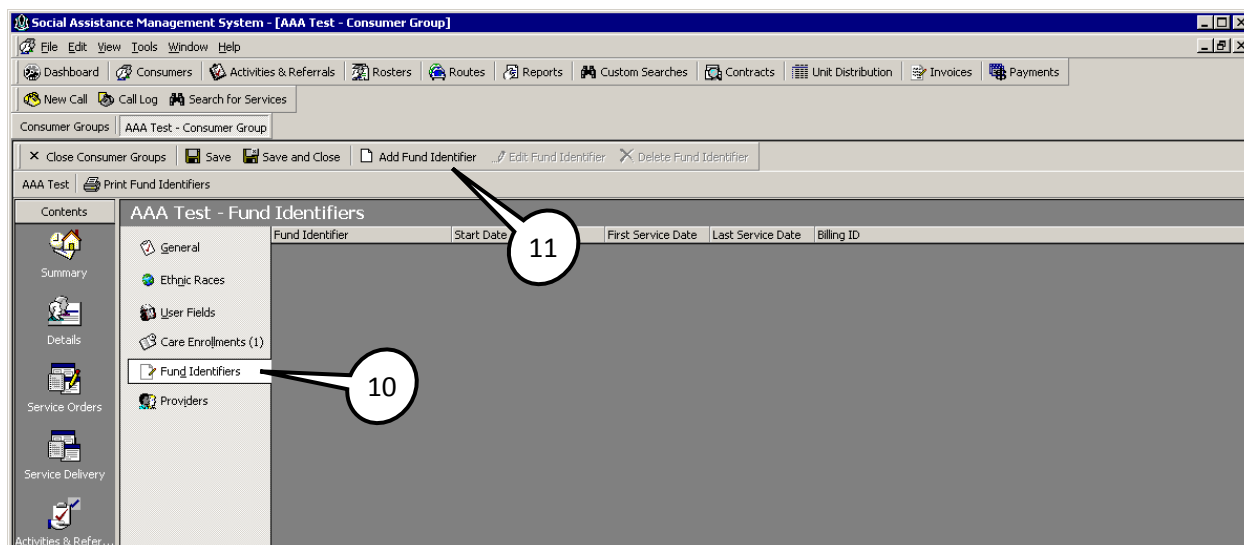


8. The **Add Care Enrollment** window will appear. Complete this using the appropriate Level of Care as well as the Service Program. Also the “Application Date”, “Received Date”, “Status Date” and “Start Date” have to be the same and must reflect the instance when the enrollment should have started for the consumer.
9. Click on the **OK** button.

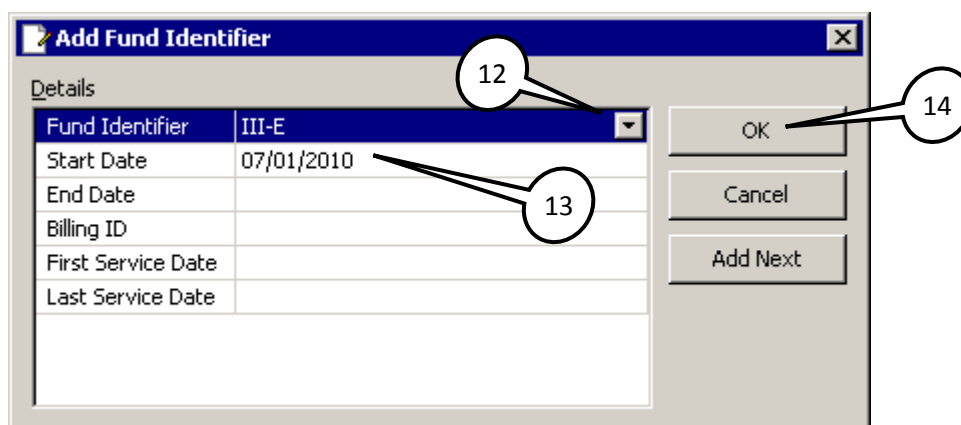
The 'Add Care Enrollment' dialog box is shown. It has a 'Details:' section with a table of fields. The fields are: Level of Care (Federal Administration...), Service Program (Family Caregiver Supp...), Care Program Name (Family Caregiver Supp...), Application Date (07/01/2009), Received Date (07/01/2009), Termination Date, Status (Active), Reason, Status Date (07/01/2009), Start Date (07/01/2009), and End Date. The 'Start Date' field is highlighted. To the right of the table are three buttons: 'OK', 'Cancel', and 'Add Next'. A callout bubble with the number 8 points to the 'Start Date' field, and another callout bubble with the number 9 points to the 'OK' button.

Details:	
Level of Care	Federal Administration...
Service Program	Family Caregiver Supp...
Care Program Name	Family Caregiver Supp...
Application Date	07/01/2009
Received Date	07/01/2009
Termination Date	
Status	Active
Reason	
Status Date	07/01/2009
Start Date	07/01/2009
End Date	

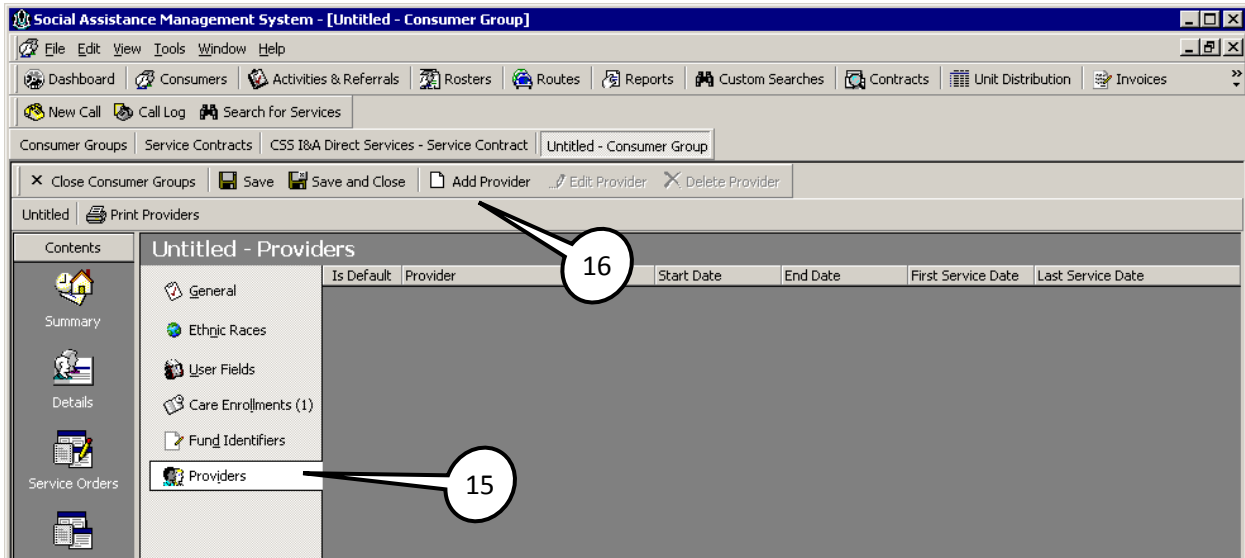
10. Select **Fund Identifier** from the Consumer Group Details sub-menu.
11. Click on **Add Fund Identifier**.



12. When the Add Fund Identifier window appears, select the appropriate **Fund Identifier**.
13. Ensure the **Start Date** is correct.
14. Click the **OK** button.



15. Select **Provider** from the Consumer Group Details sub-menu.
16. Click on **Add Provider**.



17. When the Add Consumer Provider window appears, select **CSS Direct Services** as the **Provider**.
18. Ensure the **Start Date** is correct.
19. Click on the **OK** button.

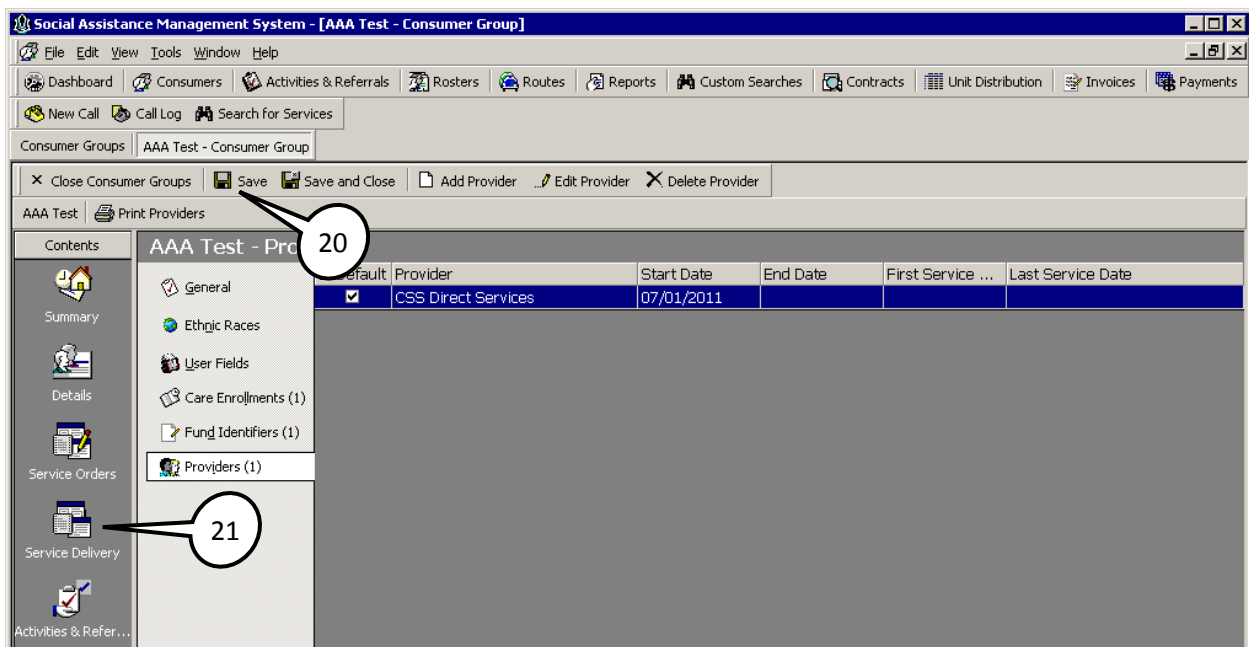
The 'Add Consumer Provider' dialog box is shown. The 'Provider' dropdown menu is set to 'CSS Direct Services' (callout 17). The 'Start Date' is '07/01/2011' (callout 18). The 'OK' button is highlighted (callout 19).

Details	
Provider	CSS Direct Services
Default Provider	Yes
Start Date	07/01/2011
End Date	
First Service Date	
Last Service Date	
Info Release Authorized	No

20. Click on the **Save** button before continuing.

Part III: Adding Services and Units of Service

21. Select **Service Delivery** from the Content section.



22. Click on the **Add Service** button.



23. **Select** the appropriate **Care Program**.
24. **Select** the appropriate **Service Category, Service, and Fund Identifier**.
25. Ensure **CSS Direct Services** is displayed under the **Provider** field.
26. **Enter** the site that reflects your program (i.e. Service Center or I&A)
27. **Enter** the number of **Consumers Served***
28. **Double click** on **Daily Unit Details** for the calendar to appear.

Social Assistance Management System - [AAA Test - Consumer Group]

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches Contracts Unit Distribution Invoices Payments

New Call Call Log Search for Services

Consumer Groups AAA Test - Consumer Group

Close Consumer Groups Save Save and Close Add Service Edit Service Copy Service Delete Service Use Service Template Apply Close

AAA Test Print Service Print Preview Service Total on Service Filter Clear Filter

AAA Test - Service Delivery

Service	Provider	Care Program Name	Service Period	Clients Served	Topics	Type	Unit Price	Total Units
Service Delivery								
Care Program	Family Caregiver Support Program (07/01/2011) - Active							
Service Category	Information Services							
Service	III-E FCSP Information and Asst. - Activity							
Subservice								
Fund Identifier	III-E							
Topics	(0 Items)							
Service Month	07/2011							
Agency	Los Angeles County AAA							
Provider	CSS Direct Services							
Subprovider								
Site								
Place of Service								
Consumers Served	1,000							
Total Units	1000.00							
Units/Consumer	1.00000000							
Unit Price	\$0.00							
Daily Unit Details	(1 Item)							
Total Cost	\$0.00							
Diagnosis Code								
Service Order	(None)							
Comments								

29. Click on a date on the calendar and enter the cumulative number of services* provided for during that period.
30. When done, **click** on the **OK** button.

The screenshot shows a 'Daily Units' window with a calendar for February 2011. The calendar has columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The dates 1 through 28 are visible. A callout bubble labeled '29' points to the date '1' on Tuesday. Another callout bubble labeled '30' points to the 'OK' button at the bottom right of the calendar.

31. Select **Save and Close** from the menu to record the data entry.

The screenshot shows the 'Social Assistance Management System' interface. The window title is 'Social Assistance Management System - [Untitled - Consumer Group]'. The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar includes buttons for Dashboard, Consumers, Activities & Referrals, Rosters, Routes, Reports, Custom Searches, Contracts, Unit Distribution, and Invoices. The main area shows a table titled 'Untitled - Service Delivery' with columns: Service, Provider, Program Name, Service Period, Clients Served, Topics, Type, Unit Price, and Total Units. A callout bubble labeled '31' points to the 'Save and Close' button in the menu bar.

*** Note that some services require that Consumers Served and Daily Unit Details be the same amount of units.**